

The Express Purchase Order User Manual

**The Spectrum+ System
Georgia State University**

**PeopleSoft Financials
Version 8.9**

(Revised 1/30/2012)

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CHAPTER 1: INTRODUCTION

1.1 PURCHASING OVERVIEW

Purchasing is the business process of procuring goods and services from vendors in order to continue business operations.

Express Purchase Orders, also referred to as Express POs, are used at Georgia State University to purchase services, commodities, and equipment which have a value greater than \$4,999.99 and for which competitive bidding is required by State law. The Purchasing Department will determine whether a contract, purchase order, request for quote, or request for proposal is required. There are some exceptions to this rule. If you have any questions, you should contact the Purchasing Department before entering the Express PO or refer to the Dollar Value Grid located in Appendix A of this document.

Express POs are also used for consultant agreements and blanket travel authorizations. See Consulting Contract Information and Travel Services training guides for details.

For additional information regarding purchasing policies, consult the Purchasing Department's website at: <http://www2.gsu.edu/~wwwpch/>.

The training manual and policies for consultant services and travel can be found on the following websites:

http://www2.gsu.edu/~wwwfas/FinancialOperation/consultingcontract_new.html

<http://www2.gsu.edu/~wwwfas/FinancialOperation/TravelServices.pdf>

1.2 USE OF EXPRESS POs

The Express PO functionality provides a rapid-entry version of the Purchase Order page. This page enables users to view Lines, Schedules, and Distributions on a single page.

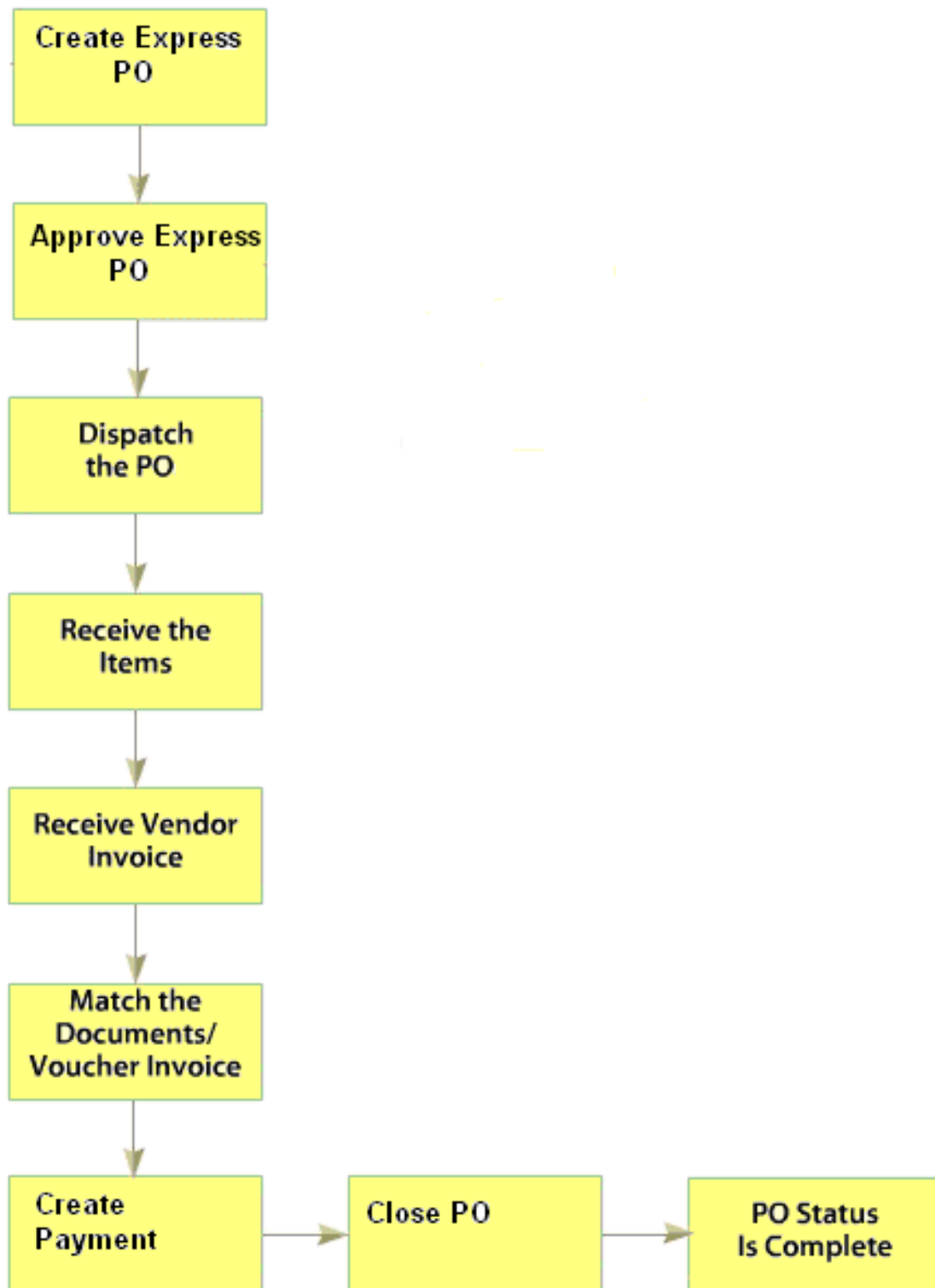
Georgia State has made the decision not to use Requisitions and the eProcurement module.

Departmental requesters will use the Purchase Order as their point of entry for requesting goods or services.

Requesters will enter Express POs through the Express PO page. The Express PO will go through workflow approval. After the Departmental approval, the Buyers in the Purchasing Department will be responsible for reviewing/updating and dispatching the final Purchase Order.

Upon completion of this manual, you will be able to enter an Express Purchase Order in the Spectrum 8.9 System, make corrections, and perform online inquiries and queries.

1.3 Primary Functions of the PO Module



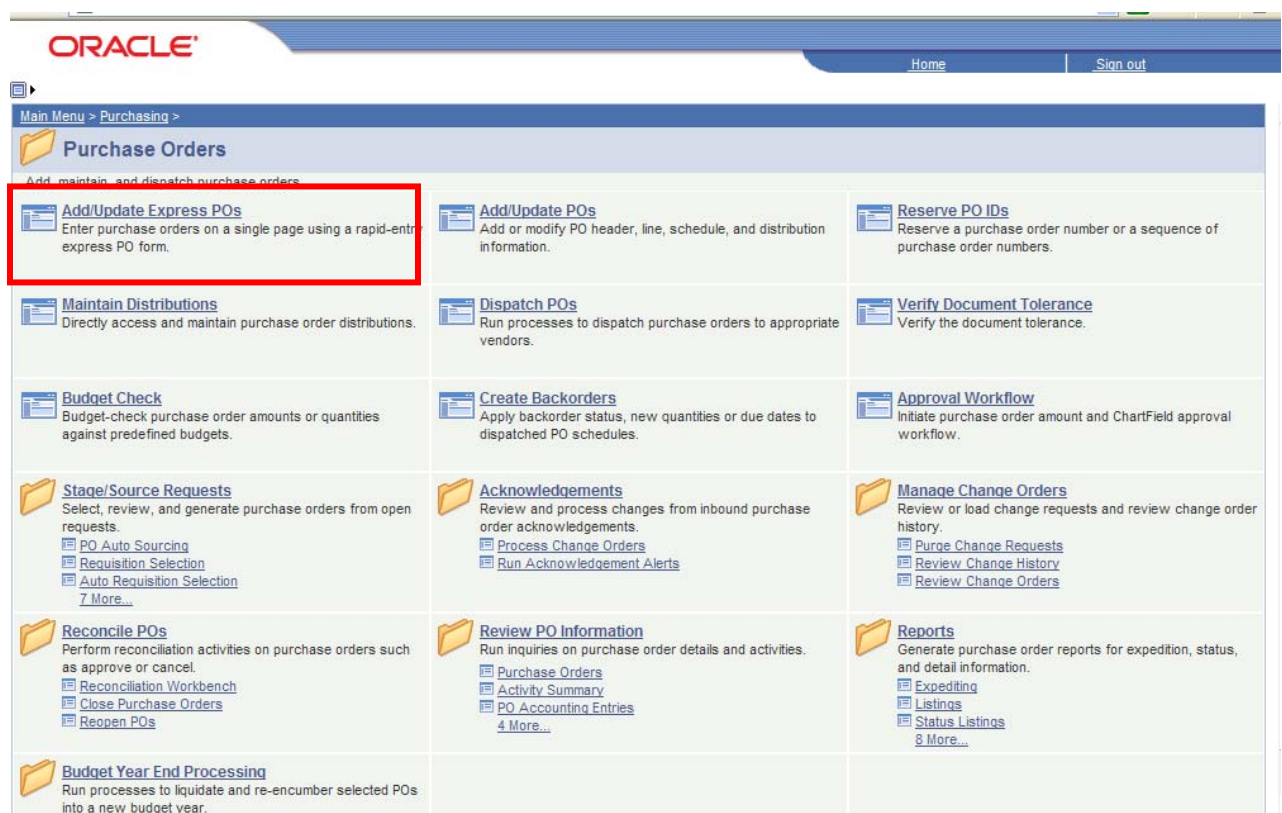
Chapter 2: CREATING A BASIC EXPRESS PO: PO0020.770

Each step in the online process of entering an Express PO is described below. Compare your screen to the screen shots in the example for each step.

2.1 Creating an Express PO

Navigation:

Purchasing > Purchase Orders > Add/Update Express POs



2.1.1 Add Express PO

Click on the **Add a New Value** tab.



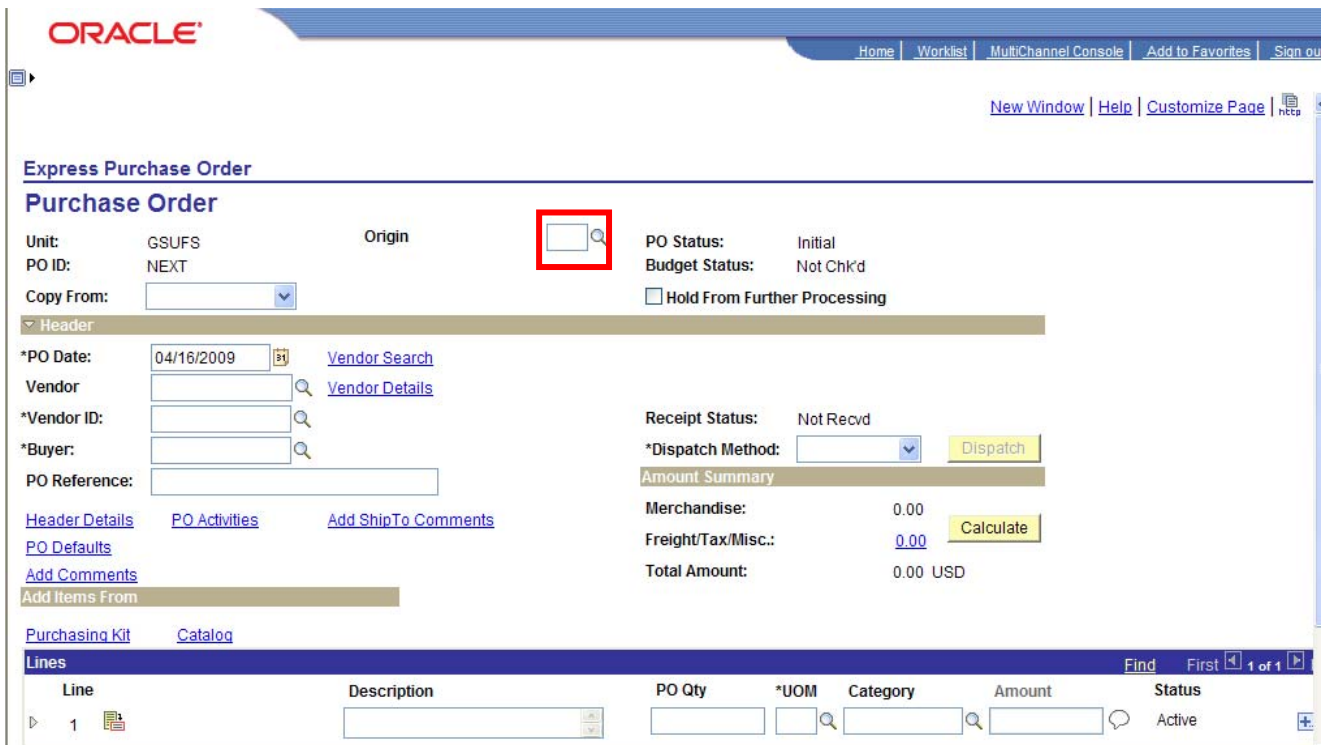
The screenshot shows the Oracle Express Purchase Order interface. At the top, the Oracle logo is visible. Below it, the title 'Express Purchase Order' is displayed. There are two tabs: 'Find an Existing Value' and 'Add a New Value', with the latter being selected. The form contains the following fields:

- Business Unit:** GSUFS (with a magnifying glass icon)
- PO ID:** NEXT
- Purchase Order Date:** 04/16/2009 (with a calendar icon)

A red rectangle highlights the 'Add' button. Below the form, there are links for 'Find an Existing Value' and 'Add a New Value'.

2.1.2. Choose the Origin

Click on the magnifying glass



The screenshot shows the Oracle Express Purchase Order interface. At the top, the Oracle logo is visible. Below it, the title 'Express Purchase Order' is displayed. There are two tabs: 'Find an Existing Value' and 'Add a New Value', with the latter being selected. The form contains the following fields:

- Unit:** GSUFS
- PO ID:** NEXT
- Copy From:** (dropdown menu)
- Origin:** (field with a magnifying glass icon, highlighted by a red rectangle)
- PO Status:** Initial
- Budget Status:** Not Chk'd
- ☐ Hold From Further Processing

Below the form, there are links for 'Find an Existing Value' and 'Add a New Value'. The 'Origin' field is highlighted with a red rectangle, and a magnifying glass icon is visible next to it.

Amount Summary

Amount	Unit
Merchandise:	0.00
Freight/Tax/Misc.:	0.00
Total Amount:	0.00 USD

The options you should choose are **DRG (Department Regular)** or **PRJ (Project)**. ONL and FA are reserved for Central Admin areas. These options drive the workflow approval of your Express Voucher. Click on **DRG** or **PRJ**.

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Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) |

Menu

Search:

- ▷ Accounts Payable
- ▷ GSU
- ▼ Purchasing
 - ▷ Procurement Contracts
 - ▼ Purchase Orders
 - ▷ Manage Change Orders
 - ▷ Review PO Information
 - Add/Update Express POs
- ▷ Travel and Expenses
- ▷ Accounts Receivable
- ▷ BOR Menus
- ▷ Commitment Control
- ▷ General Ledger
- ▷ Set Up Financials/Supply Chain
- ▷ Worklist
- ▷ Reporting Tools
- ▷ PeopleTools

Look Up Origin

SetID: GSUFS

Origin: begins with

Description: begins with

[Basic Lookup](#)

Search Results

[View All](#) First 1-4 of 4 Last

Origin	Description
DRG	Department Regular Rule
FA	Financial Aid - Stu Ac Ref/Ret
ONL	On Line
PRJ	Project Regular

2.1.3. Enter Department ID

After choosing the origin, the system returns you to the main page. Under the Origin box, you will see there is now a box for the Department. Here, you will enter your 9-digit DRG Department Number or 10-digit PRJ Department Number for workflow approval.

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Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | http

Express Purchase Order

Purchase Order

Unit: GSUFS
PO ID: NEXT

Origin: DRG

PO Status: Initial
Budget Status: Not Chk'd

Department:

Copy From:

☐ Hold From Further Processing

Header

*PO Date: 04/17/2009 [Vendor Search](#)
Vendor: [Vendor Details](#)
*Vendor ID:
*Buyer:
PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#)
[Add Comments](#)
[Add Items From](#)

[Purchasing Kit](#) [Catalog](#)

Receipt Status: Not Recvd
*Dispatch Method: [Dispatch](#)

Amount Summary

Merchandise: 0.00
Freight/Tax/Misc.: 0.00 [Calculate](#)
Total Amount: 0.00 USD

Lines

Line	Description	PO Qty	*UOM	Category	Amount	Status
1						Active

You may also use the magnifying glass to search for your Department number.

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Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Procurement Contracts
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
- Travel and Expenses
- Accounts Receivable
- BOR Menus
- Commitment Control
- General Ledger
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools

Look Up Department

Department: begins with 1106000

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First 1 of 1 Last

Department Description
110600000 Biology

When you choose the Department number from the Search list, you will be redirected to the main page.

ORACLE

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | help

Menu

Search: []

- My Favorites
- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
 - Commitment Control
 - General Ledger
 - Worklist
 - Reporting Tools
 - PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: DRG PO Status: Initial
 PO ID: NEXT Budget Status: Not Chkd
 Department: 110600000

Copy From: [] Hold From Further Processing

Header

*PO Date: 05/11/2009 Vendor Search
 Vendor: [] Vendor Details
 *Vendor ID: []
 *Buyer: []
 PO Reference: []

Receipt Status: Not Recvd
 *Dispatch Method: [] Dispatch

Amount Summary

Merchandise: 0.00
 Freight/Tax/Misc.: 0.00 Calculate
 Total Amount: 0.00 USD

Header Details PO Activities Add ShipTo Comments
 PO Defaults
 Add Comments
 Add Items From

Purchasing Kit Catalog

Lines

Line	Description	PO Qty	*UOM	Category	Amount
1	[]	[]	[]	[]	[]

Chapter 3: Header Area

3.1 Selecting a Vendor

In Spectrum 8.9, the vendor field is required and must be completed or you will receive an error message. There are two ways to search for a vendor; by using Vendor Search or searching for the Vendor ID.

Header

*PO Date: 05/11/2009 Vendor Search
 Vendor: [] Vendor Details
 Vendor ID: []
 *Buyer: []
 PO Reference: []

Receipt Status: Not Recvd
 *Dispatch Method: [] Dispatch

Amount Summary

Merchandise: 0.00
 Freight/Tax/Misc.: 0.00 Calculate
 Total Amount: 0.00 USD

Header Details PO Activities Add ShipTo Comments
 PO Defaults
 Add Comments

3.1.1. Vendor Search

Click the Vendor Search link.

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Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page |

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Procurement Contracts
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
- Travel and Expenses
- Accounts Receivable
- BOR Menus
- Commitment Control
- General Ledger
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools

Vendor Search

Search Criteria

Name: ShortName:

City: State:

Country: Postal:

Class: Type:

Max Rows:

Search

Search Results

Sel	Vendor ID	Address	Short Vendor Name	Name 1	Withholding Applicable
☐					

Vendor Detail Address

OK Cancel Refresh

In the ShortName field, type the first few letters of the vendor name and click the Search button. Look for Dell Marketing Corporation in the list.

ORACLE

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page |

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Procurement Contracts
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
- Travel and Expenses
- Accounts Receivable
- BOR Menus
- Commitment Control
- General Ledger
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools

Vendor Search

Search Criteria

Name: ShortName:

City: State:

Country: Postal:

Class: Type:

Max Rows:

Search

1 to 10 of 15

Search Results

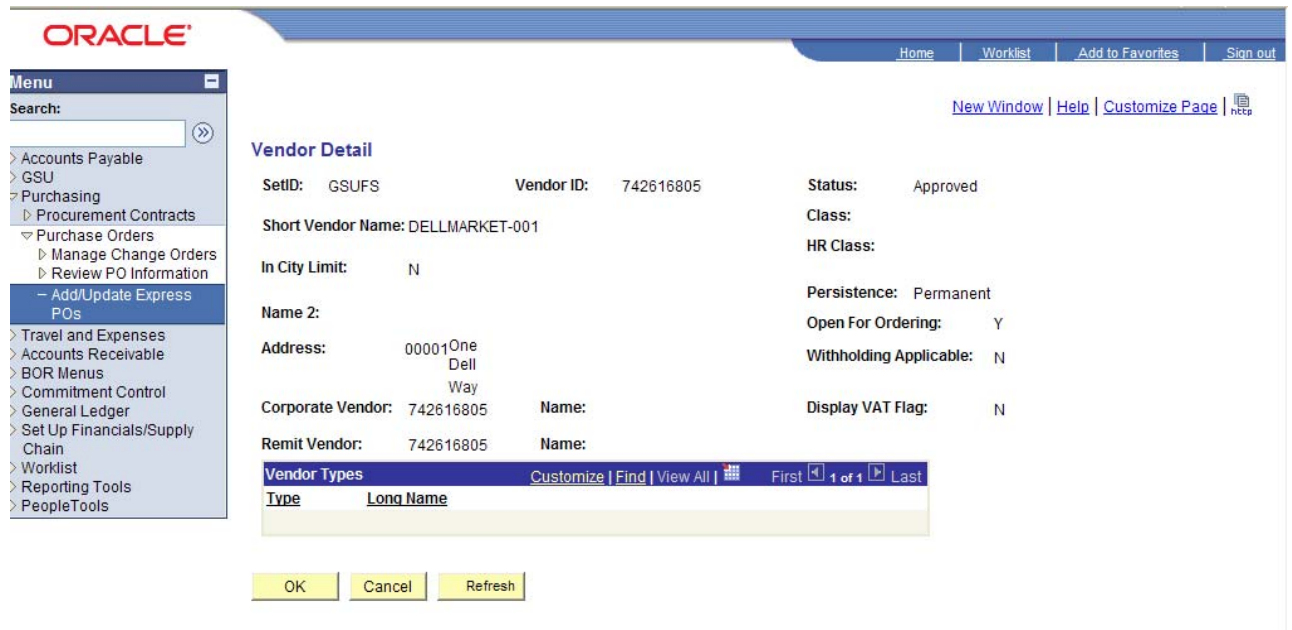
Sel	Vendor ID	Address Sequence Number	Short Vendor Name	Name 1	Withholding Applicable
☐	0000009587	1	DELLINGERS-002	DELLINGER,SUSAN E	N
☐	0000018012	1	DELLIMAGIN-001	DELL IMAGING SYSTEMS LLC	N
☐	742616805	1	DELLMARKET-001	Dell Marketing Corporation	N
☐	742616805	2	DELLMARKET-001	Dell Marketing Corporation	N
☐	742616805	3	DELLMARKET-001	Dell Marketing Corporation	N

Vendor Detail Address

OK Cancel Refresh

Notice there are three listings for Dell Marketing. These listings represent different addresses that are entered in the vendor database for Dell Marketing.

To determine which address you want, you can check the box next to one of the listings. Then click the Vendor Detail link to view the vendor address. Click Cancel.



The screenshot shows the Oracle Vendor Detail page for Vendor ID 742616805. The left sidebar contains a menu with options like Accounts Payable, GSU, Purchasing, and Procurement Contracts. The main content area displays vendor information: SetID: GSUFS, Status: Approved, Class: , HR Class: , Persistence: Permanent, Open For Ordering: Y, Withholding Applicable: N, Display VAT Flag: N. Below this is a table of Vendor Types with columns Type and Long Name. At the bottom are buttons for OK, Cancel, and Refresh.

Type	Long Name
------	-----------

You may also click the Address link to view the address information. Click Cancel. Click Cancel, again.



The screenshot shows the Oracle Address page for Vendor ID 742616805. The left sidebar is the same as the previous screenshot. The main content area displays address information: SetID: GSUFS, Country: USA, United States, Address 1: One Dell Way, Address 2: Dept At 40275, Address 3: P.O. Box 8711, City: Round Rock, County: , Postal: 78682-0325, State: TX, Texas. At the bottom are buttons for OK, Cancel, and Refresh.

The system returns you to the main page. The most common way to select a vendor is to click on the magnifying glass next to the Vendor ID field to view the complete list of vendors.

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Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: DRG PO Status: Initial
PO ID: NEXT Budget Status: Not Chk'd
Department: 110600000
Copy From: ☐ Hold From Further Processing

Header

*PO Date: 04/17/2009 [Vendor Search](#)
Vendor: [Vendor Details](#)
*Vendor ID:
*Buyer:
PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#)
[Add Comments](#)
[Add Items From](#)

[Purchasing Kit](#) [Catalog](#)

Amount Summary

Receipt Status: Not Recvd
*Dispatch Method:
Merchandise: 0.00
Freight/Tax/Misc.: 0.00
Total Amount: 0.00 USD

Lines

Line	Description	PO Qty	*UOM	Category	Amount
1					

Expand All Collapse All

Please note 'GSU Default Vendor' is an option. However, we recommend that you select a preferred vendor on the Express PO.

ORACLE

Home | Sign out

New Window | Help |

Look Up Vendor ID

SetID: GSUFS

Vendor ID: begins with

Short Vendor Name: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

[View All](#) First 1-100 of 103 Last

Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
0000000001	GSUDEFAULT-001	GSU DEFAULT - CHANGE VENDOR	(blank)	(blank)	(blank)
0000000002	BELLMARKET-001	BELL MARKETING LP	(blank)	(blank)	(blank)
0000000003	SOVEREIGN-001	SOVEREIGN BUSINESS SERVICES	(blank)	(blank)	(blank)
0000000004	XEROX-001	XEROX CORPORATION	(blank)	(blank)	(blank)
0000000006	CYTOSKELET-001	CYTOSKELETON, INC.	(blank)	(blank)	(blank)
0000000018	FAMILYSUPP-001	Family Support Registry (FSR)	(blank)	(blank)	(blank)
0000000024	WISCONSIN-001	Wisconsin Support Collections Trust Fund	(blank)	(blank)	(blank)
0000000025	LIVINGSTON-003	Livingston County SCU	(blank)	(blank)	(blank)
0000000028	STATECOURT-002	State Court of Fulton County	100 Justice Tower	(blank)	(blank)
0000000033	USDEPARTIME-001	US Department of Education	(blank)	(blank)	(blank)
0000000038	MARYIDATO-001	MARY IDA TOWNSON, CHAPTER 13 TRUSTEE	(blank)	(blank)	(blank)
0000000039	CHAPTER13T-002	Chapter 13 Trustee	(blank)	(blank)	(blank)
0000000046	ISESCORPOR-001	ISES CORPORATION	(blank)	(blank)	(blank)
0000000093	VARIOUSVEN-001	VARIOUS VENDORS	(blank)	(blank)	(blank)
0000000122	HUNTINGTON-001	Huntington Data Systems	(blank)	(blank)	(blank)
0000000149	DUTCHESS-001	Dutchess County SCU	(blank)	(blank)	(blank)
0000000222	MEDCO-002	MEDCO Company	(blank)	(blank)	(blank)

In the Short Vendor Name field, type the first few letters of the vendor name and click the Look Up button. Select the desired vendor and the system will return you to the main page.

3.2 Selecting a Buyer

Every Express PO will be assigned to a Buyer in the Purchasing Department. Next to the Buyer field, click the magnifying glass. You will be taken to a list of Buyers. Choose the appropriate Buyer for the commodity or service you would like to purchase. The 'Default GSU Buyer' option is only to be used when the Buyer cannot be readily identified. See **Appendix B** for the Commodity Listing by Buyer. As with the Vendor field, every effort should be made to choose a Buyer.

Caution: Submitting Express POs with Default Vendor AND Default Buyer information may delay PO processing.

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Home | Sign out

[New Window](#) | [Help](#) |

Look Up Buyer

Buyer: begins with

Name: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

[View All](#) First 1-9 of 9 [Last](#)

Buyer	Name
CLUALLEN	Luallen, Catherine
CMONK	Monk, Charles
DHOUSWORTH	Housworth, Deborah
GSU_TEST_BUYER	GSU Test Buyer
HHOPWOOD	Hopwood, Howard
JOHNJONES	Jones, John
KMILTON	Milton, Karmen
LMCCALOP	Mccalop, Larry
SWILLOUGHBY	Willoughby, Sharee

3.3 Entering PO Defaults

The PO Defaults link allows you to enter information that will be defaulted or copied throughout the Express PO. This allows you to add lines to the Express PO without having to re-enter the same information repeatedly.

Click the PO Defaults link.

The screenshot displays the Oracle Express Purchase Order interface. At the top, the Oracle logo is on the left, and navigation links for Home, Sign out, New Window, Help, and Customize Page are on the right. The main heading is "Express Purchase Order". Below this, the "Purchase Order" section contains fields for Unit (GSUFS), PO ID (NEXT), Copy From (a dropdown), PO Status (Approved), Budget Status (Not Chk'd), and a checkbox for "Hold From Further Processing". A "Header" section follows, containing fields for *PO Date (04/16/2009), Vendor (DELLMARKET-001), *Vendor ID (0000000002), *Buyer (KMILTON), and PO Reference. To the right of these fields are links for Vendor Search, Vendor Details, and a Receipt Status (Not Recvd) with a Dispatch Method (Print) and a Dispatch button. Below the header fields is an "Amount Summary" section with Merchandise (0.00), Freight/Tax/Misc. (0.00), and Total Amount (0.00 USD), along with a Calculate button. A navigation bar includes links for Header Details, PO Activities, Add ShipTo Comments, PO Defaults (highlighted with a red box), Add Comments, and Add Items From. At the bottom, there are links for Purchasing Kit and Catalog, and a table titled "Lines" with columns for Line, Description, PO Qty, *UOM, Category, Amount, and Status. The table shows one line with Line 1, an empty Description, empty PO Qty and *UOM, an empty Category, an empty Amount, and a Status of Active. At the very bottom, there are links for Expand All and Collapse All.

ORACLE

Home | Sign out

Purchase Order Defaults

Unit: GSUFS PO ID: NEXT Vendor: DELLMARKET-001

Default Options

☐ Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ Override If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category: Unit of Measure:

Schedule

Ship To: CENTRAL Central Receiving Ultimate Use Code:

Due Date: Original Promise Date:

Ship Via: VENDOR Freight Terms Code: FOB.DEST

Arbitration: Freight Charge Method:

*Distribute by: Quantity [One Time Address](#)

Distributions

SpeedChart:

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project	Activity	Budget Date	Location
1		GSUFS						2009				04/16/2009	PO_MAIN

The **Default Options** area defaults to Override to allow you to make changes to the Express PO. This should remain clicked. If you click Default, you will not be able to make any changes to the Express PO if an error is made.

The **Line** area of this screen will not be used.

The **Schedule** area of this screen will not be used.

The **Distribution** area of this screen is where you enter the SpeedChart, which will be defaulted throughout the Express PO. Enter your departmental SpeedChart in the SpeedChart field and click on the magnifying glass and select your item from the list (note that if you do not take this extra step your chartfields will be populated in the main P.O. but not in the defaults). You may also search for your SpeedChart by entering a few letters of the SpeedChart and then clicking the magnifying glass.

You will be taken to a list of values from which to choose. Click your selection from the list. Note that you will not see your selection in the SpeedChart field on the Defaults page but the chartfields will be populated throughout your Express P.O.

ORACLE

Home | Sign out

[New Window](#) | [Help](#) |

Look Up SpeedChart

SetID: GSUFS

SpeedChart Key: begins with

[Basic Lookup](#)

Search Results

[View All](#) First Last

SpeedChart Key	Description
BIOLI	Biology

You will be brought back to the PO Defaults page and your information will populate the Distribution field. Scroll to the far right of the Purchase Order Defaults page to see the default Location Code. The location field determines where the goods you are requesting should be delivered to when the GSU Warehouse personnel receives them. If the location field is not changed, it defaults to the GSU Purchasing Office at 1 Park Place. Please change this field so that your goods will be delivered to the appropriate area.

NOTE: Updating the Location Code is required for the purchase of goods, where they will be received by GSU and delivered to a Department. If the Purchase Order is for Travel, Consulting Fees or other services, then changing the Location is not required.

Click on the Location look up icon to change it from the default value, PO_MAIN.

Distribution

SpeedChart:

Distributions

Chartfields Asset Information

Customize Find View All

first 1 of 1 Last

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project	Activity	Budget Date	Location	IN Unit
1	100.0000	GSUFS		10000	110600000	11100	11000	2010				10/16/2009	PO_MAIN	

Look Up Location

SetID: GSUFS

Location Code:

Description: Citizens Trust

[Basic Lookup](#)

Search Results

View All First 1-69 of 69 Last

Location Code	Description
CTB	Citizens Trust Building
CTB1000	Citizens Trust Building
CTB1001	Citizens Trust Building
CTB1002	Citizens Trust Building
CTB1003	Citizens Trust Building
CTB1004	Citizens Trust Building
CTB1008	Citizens Trust Building
CTB1009	Citizens Trust Building
CTB1015	Citizens Trust Building
CTB1018	Citizens Trust Building
CTB1025	Citizens Trust Building
CTB1026	Citizens Trust Building
CTB1027	Citizens Trust Building
CTB1029	Citizens Trust Building

You can search for your Location Code either through the Location Code field or the Location Description field. Select the Location where you want the goods delivered to.

Distribution

SpeedChart:

Distributions

Chartfields Asset Information

Customize Find View All

first 1 of 1 Last

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project	Activity	Budget Date	Location	IN Unit
1	100.0000	GSUFS		10000	110600000	11100	11000	2010				10/16/2009	CTB	

Scroll to the bottom of the page and click OK. You will be redirected to the main page of the Express PO.

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Home Sign out

PO ID: NEXT Budget Status: Not Chkd
Copy From: ☐ Hold From Further Processing

Header

*PO Date: 04/16/2009 [Vendor Search](#)
Vendor: DELLMARKET-001 [Vendor Details](#)
*Vendor ID: 0000000002 DELL MARKETING LP
*Buyer: KMILTON Milton, Karmen
PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#)
[Add Comments](#)
[Add Items From](#)

Receipt Status: Not Recvd
*Dispatch Method: Print
Amount Summary
Merchandise: 0.00
Freight/Tax/Misc.: 0.00
Total Amount: 0.00 USD

[Purchasing Kit](#) [Catalog](#)

Lines

Line	Description	PO Qty	*UOM	Category	Amount	Status
1						Active

[Expand All](#) [Collapse All](#)
[View Printable Version](#)
Go to: More ...

Main Content

3.4 Other Links under the Header Panel

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#)
[Add Comments](#)
[Add Items From](#)

[Purchasing Kit](#) [Catalog](#)

Merchandise: 0.00
Freight/Tax/Misc.: 0.00
Total Amount: 0.00 USD

- Header Details** contains template information that should not be changed by the requestor. ***Do not change any information in this link.***
- PO Activities** will not be used by the end user under any circumstances. ***Do not change any information in this link.***

- c. **Add Ship to Comments** can be used by the requestor if there are special delivery instructions.
- d. **Add Comments** will be used when the Travel or Consultant template is copied in an Express PO. This field may also be used by the requestor if there are comments to be relayed to the approver or if there are special comments that should be viewed by the Purchasing Department.
- e. Unlike the Voucher Module, the **Calculate** button under the Header Panel will not be used by the end user under any circumstances. ***Do not click the Calculate button.***
- f. Georgia State has opted not to use the **Purchasing Kit** and **Catalog** links in the implementation of 8.9.

4. Lines Panel

As mentioned previously, the Express PO allows you to enter all of the required information on one page. The Lines area is where the Line Description, Quantity, Unit of Measure (UOM), Category and Price will be entered.

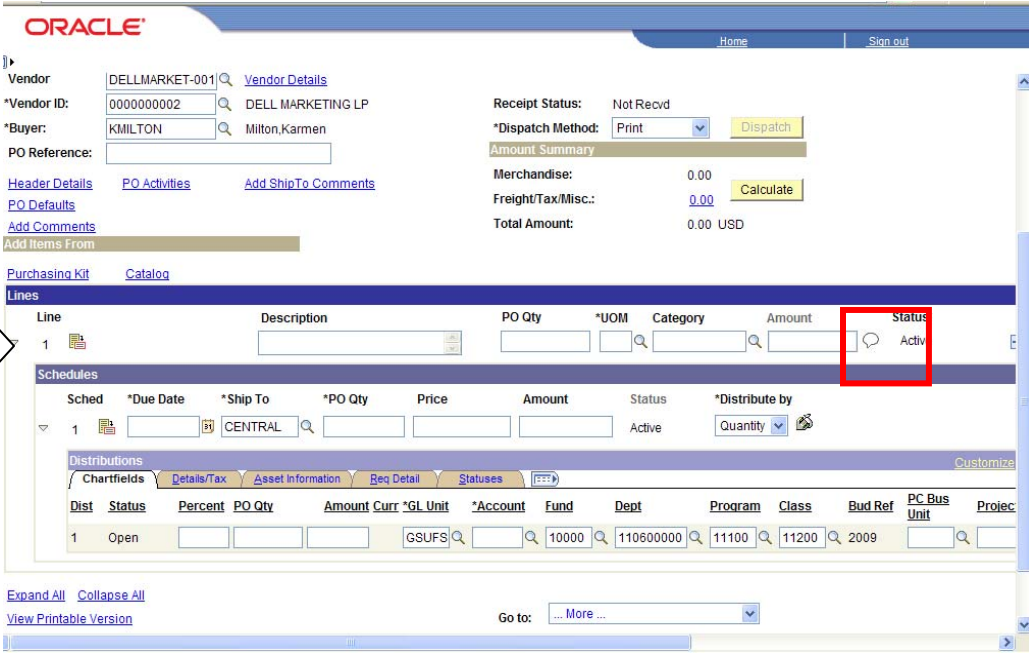
Click the [Expand All](#) link to view three areas: the Lines, Schedules and Distributions areas. The [Collapse All](#) link reduces the view back to Lines view only.

4.1 Lines

4.1.1 Entering Line Description, Quantity, UOM, and Line Comments

Enter a description of the item you are purchasing under **Description** and press Tab. Enter the **Quantity** or how many of the item you wish to purchase and press Tab. Enter the **Unit of Measure (UOM)** and press Tab

or use the magnifying glass to search the list of values available. To enter a line comment, click the  icon.



The screenshot shows the Oracle Purchasing interface. At the top, there's a header with the Oracle logo and navigation links like Home and Sign out. Below this, the Vendor information is displayed: Vendor ID: 0000000002, Buyer: KMILTON, and PO Reference. To the right, there's a section for Receipt Status (Not Recvd) and Dispatch Method (Print). Below that, an Amount Summary section shows Merchandise (0.00), Freight/Tax/Misc (0.00), and Total Amount (0.00 USD). A red box highlights the Status field in the Lines section, which is currently set to 'Active'. A comment icon is visible next to the Status field. A large white arrow points to the comment icon. Below the Lines section, there's a Schedules section with a table showing Sched, Due Date, Ship To, PO Qty, Price, Amount, Status, and Distribute by. The bottom section is Distributions, with a table showing Dist, Status, Percent, PO Qty, Amount, Curr, GL Unit, Account, Fund, Dept, Program, Class, Bud Ref, PC Bus Unit, and Project.

Line	Description	PO Qty	*UOM	Category	Amount	Status
1						Active

Sched	*Due Date	*Ship To	*PO Qty	Price	Amount	Status	*Distribute by
1		CENTRAL				Active	Quantity

Dist	Status	Percent	PO Qty	Amount	Curr	*GL Unit	*Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project
1	Open					GSUFS		10000	110600000	11100	11200	2009		

Please note you will not use the [Copy Item Specs](#) link. Also, the Attach button for attachments will not be used. Type your line comments in the Comment field and click OK.

[Home](#)
[Worklist](#)
[Add to Favorites](#)
[Sign out](#)

[New Window](#)
[Help](#)
[Customize Page](#)

PO Line Comments

Unit: GSUFS PO ID: NEXT Vendor:

Line: 1

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments

[Find](#)
[View All](#)
First
1 of 1
Last

[Copy Standard Comments](#)
[Copy Item Specs](#)

Comment Status: Inactivate

☐ Send to Vendor
☐ Shown at Receipt
☐ Shown at Voucher

Associated Document					
Attachment		Attach	View	Delete	☐ Email

From -> PO GSUFS-NEXT

OK
Cancel
Refresh

4.1.2 Selecting Ship To Location

Click on the **'Ship To'** field to determine where your package is shipped to. The **'Ship To'** field will default to **CENTRAL**. Use the magnifying glass to select a different location only if necessary.

ORACLE®

Home | Worklist

Express Purchase Order

Purchase Order

Unit: GSUFS
PO ID: NEXT
Copy From:

Origin

PO Status: Pend Appr
Budget Status: Not Chk'd
☐ Hold From Further Processing

Header

*PO Date: 04/17/2009 [Vendor Search](#)
Vendor: GSUDEFAULT-001 [Vendor Details](#)
*Vendor ID: 0000000001 GSU DEFAULT - SELECT NEW VENDOR
*Buyer: KMILTON Milton,Karmen
PO Reference:

Receipt Status: Not Recvd
*Dispatch Method: Print [Dispatch](#)
Amount Summary
Merchandise: 0.00
Freight/Tax/Misc.: 0.00 [Calculate](#)
Total Amount: 0.00 USD

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#)
[Add Comments](#)
[Add Items From](#)

[Purchasing Kit](#) [Catalog](#)

Lines

Line	Description	PO Qty	*UOM	Category	Amount	Status
1						Active

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Amount	Status	*Distribute by
1		CENTRAL				Active	Quantity

Distributions

Chartfields

Dist	Status	Percent	PO Qty	Amount	Curr	*GL Unit	*Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit
1	Open					GSUFS		10000	110600000	11100	11000	2009	

Non-inventory items or special items which have to be installed can be sent directly to a specific location by using the magnifying glass and selecting 'GSU0000'.



Look Up Ship To

SetID: GSUFS

Ship To Location: begins with

Description: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First 1-3 of 3 Last

Ship To Location Description	
50DECATUR	Natural Science Loading Dock
CENTRAL	Central Receiving
GSU0000	See Below

Click the **'Add Ship to Comments'** link. In the comments box add the address where the package should be sent. Type **'Ship Directly to the following address:'** followed by the address where the package will be sent. Make sure that the **'Send to Vendor'** and the **'Shown at Receipt'** options are checked, and that **GSU0000** is selected in the **'Ship to'** drop-down menu. Press OK.

ORACLE

Oracle logo

PO ShipTo Comments

Unit: GSUFS PO ID: NEXT Vendor: GSUDEFAULT-001

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending [Sort](#)

[Copy Standard Comments](#) [Find](#) [View All](#) First 1 of 1 Last

Ship To: GSU0000 **Comment Status:** Active [Inactivate](#) [+](#)

Ship Directly to the Following Address:
75 Piedmont Street
Atlanta, Georgia 30303

☒ Send to Vendor ☒ Shown at Receipt ☐ Shown at Voucher

Attachment [Attach](#) [View](#) [Delete](#) ☐ Email

From -> PO GSUFS-NEXT

[OK](#) [Cancel](#) [Refresh](#)

4.1.3 Select a Due Date

The screenshot shows the Oracle Express Purchase Order interface. The 'Header' section contains fields for Unit (GSUFS), PO ID (NEXT), Origin, PO Status (Pend Appr), Budget Status (Not Chk'd), and a checkbox for 'Hold From Further Processing'. The 'Vendor' section includes *PO Date (04/17/2009), Vendor (GSUDEFAULT-001), *Vendor ID (0000000001), *Buyer (KMILTON), and PO Reference. The 'Amount Summary' section shows Merchandise (0.00), Freight/Tax/Misc. (0.00), and Total Amount (0.00 USD). The 'Lines' section is expanded, showing a table with columns: Line, Description, PO Qty, *UOM, Category, and Amount. The first line is selected, and the 'Schedules' sub-section is visible. The 'Schedules' table has columns: Sched, *Due Date, *Ship To, *PO Qty, Price, Amount, Status, and *Distribute by. The first schedule is selected, and the 'Distributions' sub-section is visible. The 'Distributions' table has columns: Dist, Status, Percent, PO Qty, Amount Curr, *GL Unit, *Account, Fund, Dept, Program, and Class. The first distribution is selected, and the 'Chartfields' sub-section is visible. The 'Chartfields' table has columns: Chartfields, Details/Tax, Asset Information, Req Detail, and Statuses. The first chartfield is selected, and the 'Statuses' sub-section is visible. The 'Statuses' table has columns: Status, Percent, PO Qty, Amount Curr, *GL Unit, *Account, Fund, Dept, Program, and Class. The first status is selected, and the 'Req Detail' sub-section is visible. The 'Req Detail' table has columns: Req Detail, Statuses, and Class. The first req detail is selected, and the 'Details/Tax' sub-section is visible. The 'Details/Tax' table has columns: Details/Tax, Asset Information, Req Detail, and Statuses. The first details/tax is selected, and the 'Asset Information' sub-section is visible. The 'Asset Information' table has columns: Asset Information, Req Detail, and Statuses. The first asset information is selected, and the 'Req Detail' sub-section is visible. The 'Req Detail' table has columns: Req Detail, Statuses, and Class. The first req detail is selected, and the 'Statuses' sub-section is visible. The 'Statuses' table has columns: Status, Percent, PO Qty, Amount Curr, *GL Unit, *Account, Fund, Dept, Program, and Class. The first status is selected, and the 'Percent' sub-section is visible. The 'Percent' table has columns: Percent, PO Qty, Amount Curr, *GL Unit, *Account, Fund, Dept, Program, and Class. The first percent is selected, and the 'PO Qty' sub-section is visible. The 'PO Qty' table has columns: PO Qty, Amount Curr, *GL Unit, *Account, Fund, Dept, Program, and Class. The first po qty is selected, and the 'Amount Curr' sub-section is visible. The 'Amount Curr' table has columns: Amount Curr, *GL Unit, *Account, Fund, Dept, Program, and Class. The first amount curr is selected, and the '*GL Unit' sub-section is visible. The '*GL Unit' table has columns: *GL Unit, *Account, Fund, Dept, Program, and Class. The first gl unit is selected, and the '*Account' sub-section is visible. The '*Account' table has columns: *Account, Fund, Dept, Program, and Class. The first account is selected, and the 'Fund' sub-section is visible. The 'Fund' table has columns: Fund, Dept, Program, and Class. The first fund is selected, and the 'Dept' sub-section is visible. The 'Dept' table has columns: Dept, Program, and Class. The first dept is selected, and the 'Program' sub-section is visible. The 'Program' table has columns: Program and Class. The first program is selected, and the 'Class' sub-section is visible. The 'Class' table has columns: Class. The first class is selected.

Select the calendar icon under the **'Due Date'** field and chose a date. This date will be the the date that you want to *receive* the shipped goods.

4.1.4 Entering the Category and Price

In 8.9, the category code is a national purchasing code called the NIGP code. Click on the magnifying glass.

ORACLE®

Home

Sign out

New Window

Help

help

Look Up Category

SetID: GSUFS
Category: begins with
Description: begins with
Account: begins with
Alternate Description: begins with

Look Up

Clear

Cancel

[Basic Lookup](#)

Search Results

[View All](#)

First 1-100 of 100 Last

Main Content

Category	Description	Account	Alternate Description
02000	AGRICULTURAL EQUIPMENT, IMPLEM	843105	Equip & Furn Purch > \$4,999.99
03100	AIR CONDITIONING, HEATING, AND	843105	Equip & Furn Purch > \$4,999.99
03113	Chillers, Heat Exchangers and	715118	Water Chiller Maintenance
05216	Drawings (Originals)	843400	Equip & Furn Purch > \$4,999.99
06000	AUTOMOTIVE MAINTENANCE ITEMS A	712105	Motor Vehicle Expense
12500	BOOKBINDING SUPPLIES	843250	Bindings
20400	COMPUTER HARDWARE AND PERIPHER	744210	Computer Purch Less Than 3000
20600	COMPUTER HARDWARE AND PERIPHER	843300	Computer Purch >\$4,999.99
20621	Communication Control Units: C	843105	Equip & Furn Purch > \$4,999.99
20625	Computer Systems, Digital	843105	Equip & Furn Purch > \$4,999.99
20732	Computer Instructional Aids an	744200	Computers - \$3,000 - \$4,999
20820	Business Software, Misc.: Agen	727114	License Fees
20900	COMPUTER SOFTWARE FOR MINI AND	733100	Software
28500	ELECTRICAL EQUIPMENT AND SUPPL	714136	Electrical Parts & Supplies
28520	Generator, Station-Type (N	744200	Computers - \$3,000 - \$4,999

Notice that you have the ability to search for the correct category by the description or account, as well as by category or Alternate Description.

As you may be unfamiliar with the category codes, you may conduct your search by Description. The search offers operands to help you narrow your results. Click the drop down arrow next to Description.

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Home | Sign out

[New Window](#) | [Help](#)

Look Up Category

SetID: GSUFS
Category:
Description:
Account:
Alternate Description:

Search Results

[View All](#) First 1-100 of 100 Last

Category	Description	Account	Alternate Description
02000	AGRICULTURAL EQUIPMENT, IMPLEM	843105	Equip & Furn Purch > \$4,999.99
03100	AIR CONDITIONING, HEATING, AND	843105	Equip & Furn Purch > \$4,999.99
03113	Chillers, Heat Exchangers and	715118	Water Chiller Maintenance
05216	Drawings (Originals)	843400	Equip & Furn Purch > \$4,999.99
06000	AUTOMOTIVE MAINTENANCE ITEMS A	712105	Motor Vehicle Expense
12500	BOOKBINDING SUPPLIES	843250	Bindings
20400	COMPUTER HARDWARE AND PERIPHER	744210	Computer Purch Less Than 3000
20600	COMPUTER HARDWARE AND PERIPHER	843300	Computer Purch > \$4,999.99
20621	Communication Control Units: C	843105	Equip & Furn Purch > \$4,999.99
20625	Computer Systems, Digital	843105	Equip & Furn Purch > \$4,999.99
20732	Computer Instructional Aids an	744200	Computers - \$3,000 - \$4,999
20820	Business Software, Misc: Agen	727114	License Fees
20900	COMPUTER SOFTWARE FOR MINI AND	733100	Software
28500	ELECTRICAL EQUIPMENT AND SUPPL	714136	Electrical Parts & Supplies

To be sure the best choice possible is made, select the operand “contains”. Then enter the item you wish to purchase.

For example, if you want to purchase a computer, type computer in the Description field and click the Look Up button.

Notice there is now a short list of category codes that contains the search word “computer”. Choose the desired category from this list.

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Home

Sign out

[New Window](#) | [Help](#) | 

Look Up Category

SetID: GSUFS
Category:
Description:
Account:
Alternate Description:

[Basic Lookup](#)

Search Results

[View All](#)
First 1-8 of 8 Last

Category	Description	Account	Alternate Description
20400	COMPUTER HARDWARE AND PERIPHER	744210	Computer Purch Less Than 3000
20600	COMPUTER HARDWARE AND PERIPHER	843300	Computer Purch >\$4,999.99
20900	COMPUTER SOFTWARE FOR MINI AND	733100	Software
20732	Computer Instructional Aids an	744200	Computers - \$3,000 - \$4,999
91829	Computer Software Consulting	751109	IT Professionals - Consultants
20625	Computer Systems, Digital	843105	Equip & Furn Purch > \$4,999.99
99829	Computers, Parts and Supplies	760110	Computer Charges - Other
91017	Energy Computerized Control Sv	715132	Emcs

You are now back at the main page of the Express PO. Go to the Schedules line and enter the price and press Tab.

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Home | Sign out

Vendor: DELLMARKET-001 [Vendor Details](#)

*Vendor ID: 0000000002 [DELL MARKETING LP](#)

*Buyer: KMILTON [Milton,Karmen](#)

PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)

[PO Defaults](#)

[Add Comments](#)

[Add Items From](#)

[Purchasing Kit](#) [Catalog](#)

Receipt Status: Not Recvd

*Dispatch Method: Print [Dispatch](#)

Amount Summary

Merchandise: 2000.00

Freight/Tax/Misc.: 0.00 [Calculate](#)

Total Amount: 2000.00 USD

Lines

Line	Description	PO Qty	*UOM	Category	Amount	Status
1	supplies	1.0000		20400	2000.00	Active

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Amount	Status	*Distribute by
1	05/16/2009	CENTRAL	1.0000	2000.00000	2000.00	Active	Quantity

Distributions

[Chartfields](#) [Details/Tax](#) [Asset Information](#) [Req Detail](#) [Statuses](#) [Customize](#)

Dist	Status	Percent	PO Qty	Amount	Curr	*GL Unit	*Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Proje
1	Open	100.000	1.0000	2000.00	USD	GSUFS	744210	10000	110600000	11100	11200	2009		

[Expand All](#) [Collapse All](#)

[View Printable Version](#)

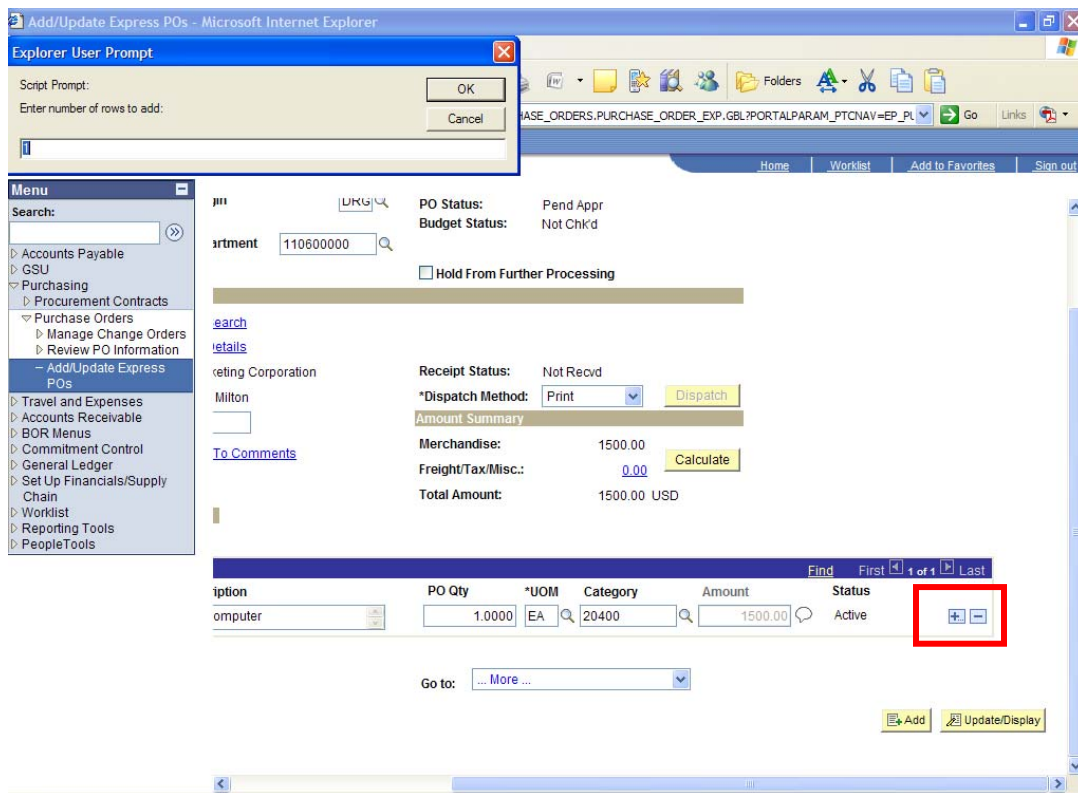
Go to: [... More ...](#)

4.2 Distributions Line

Note that the information has defaulted into the Express PO. This information was brought forward from the PO Defaults page.

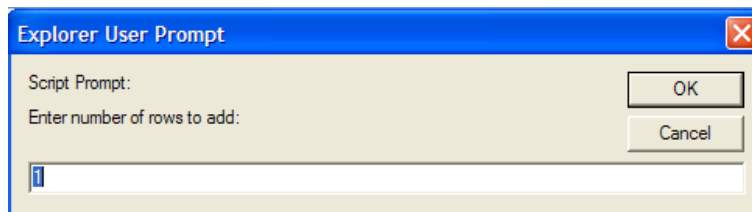
4.3 Adding and Deleting Rows

To add or delete a line to the Express PO, you will click the plus or minus sign  at the end of the Lines, Schedules or Distributions lines. When you click the plus sign  a new window, called Explorer User Prompt, will pop-up.



Note: If your computer has a pop-up blocker, you will have to make sure to turn it off for the 8.9 site.

At this prompt you can enter the number of lines you wish to add to the Express PO. You can add as many as 100 lines at one time.



Click OK.

Now there is an additional line added to the Express PO:

ORACLE

Home Worklist Add to Favorites Sign out

Unit: GSUFS Origin: DRG
 PO ID: NEXT Department: 110600000
 PO Status: Pend Appr Budget Status: Not Chk'd
 Copy From: ☐ Hold From Further Processing

Header

*PO Date: 04/17/2009 [Vendor Search](#)
 Vendor: DELLMARKET-001 [Vendor Details](#)
 *Vendor ID: 742616805 [Dell Marketing Corporation](#)
 *Buyer: KMILTON [Karmen, Milton](#)
 PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#)
[Add Comments](#)

Amount Summary

Receipt Status: Not Recvd
 *Dispatch Method: Print [Dispatch](#)
 Merchandise: 1500.00 [Calculate](#)
 Freight/Tax/Misc.: 0.00
 Total Amount: 1500.00 USD

[Add Items From](#)

[Purchasing Kit](#) [Catalog](#)

Line	Description	PO Qty	*UOM	Category	Amount	Status
1	Dell Computer	1.0000	EA	20400	1500.00	Active
2						Active

[Expand All](#) [Collapse All](#)
[View Printable Version](#)
 Go to: More ...

When you click the Expand All link, you will find the Schedules and Distribution lines are added, as well. Also, note that the SpeedChart entered in PO Defaults has defaulted into the new line.

If you wanted to charge more than one SpeedChart or account, click the plus sign  at the end of Distributions line and update the information.

Click the horizontal scroll bar to view all of the information on that line.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Lines

Line	Description	PO Qty	*UOM	Category	Amount	Status
1	Dell Computer	1.0000	EA	20400	1500.00	Active

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Amount	Status	*Distribute by
1	05/17/2009	CENTRAL	1.0000	1500.00000	1500.00	Active	Quantity

Distributions

Chartfields | Details/Tax | Asset Information | Req Detail | Statuses

Dist	Status	Percent	PO Qty	Amount	Curr	*GL Unit	*Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project
1	Open	100.000	1.0000	1500.00	USD	GSUFS	744210	10000	110600000	11100	11000	2009		

Line 2

Line	Description	PO Qty	*UOM	Category	Amount	Status
2						Active

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Amount	Status	*Distribute by
1		CENTRAL				Active	Quantity

Distributions

Chartfields | Details/Tax | Asset Information | Req Detail | Statuses

Dist	Status	Percent	PO Qty	Amount	Curr	*GL Unit	*Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project
1	Open					GSUFS		10000	110600000	11100	11000	2009		

Expand All | Collapse All

To delete a line, click the Collapse all link, then click the minus sign  at the end of Line 2. You will receive a warning message making sure you want to delete the line. Click OK.

ORACLE

Home | Worklist | Add to Favorites | Sign out

GSUFS
NEXT

Origin:

Department:

PO Status: Pend Appr
Budget Status: Not Chk'd

☐ Hold From Further Processing

04/17/2009 [Vendor Search](#)
 DELLMARKET-001 [Vendor Details](#)
 742616805 Dell Marketing Corporation
 KMILTON Karmen, Milton

[PO Activities](#) [Add ShipTo Com](#)

[Catalog](#)

Receipt Status: Not Recvd

Microsoft Internet Explorer

? Delete current/selected rows from this page? The delete will occur when the transaction is saved.

Description	PO Qty	*UOM	Category	Amount	Status
Dell Computer	1.0000	EA	20400	1500.00	Active
					Active

[Lapse All](#) [ersion](#) Go to:

5. Edit/Save Express PO

If multiple distribution lines are not required, click the Save button. The Save button also edits the Express PO in one step. It assigns the PO ID and checks the Express PO for missing information.

6. Budget Checking the Express PO

Scroll to the top of the page. After you have saved the Express PO, notice that PO ID has been assigned.

The screenshot displays the Oracle Express Purchase Order interface. At the top, the Oracle logo is on the left, and navigation links (Home, Worklist, Add to Favorites, Sign out) are on the right. The main heading is "Express Purchase Order". Below it, the "Purchase Order" section contains fields for Unit (GSPRS), PO ID (0000000059), Origin (DRG), Department (110600000), PO Status (Pend App), and Budget Status (Not Chkd). A red box highlights the PO ID field, and another red box highlights the Budget Status field. Below these fields are links for "Copy From", "Header", "PO Date", "Vendor", "Vendor ID", "Buyer", and "PO Reference". There are also links for "Header Details", "PO Activities", "Add ShipTo Comments", "PO Defaults", "Add Comments", "Add Items From", "Purchasing Kit", and "Catalog". On the right side, there are fields for "Receipt Status" (Not Recvd), "Dispatch Method" (Print), and "Amount Summary" (Merchandise: 1500.00, Freight/Tax/Misc.: 0.00, Total Amount: 1500.00 USD). Below the "Amount Summary" section is a table with columns: Line, Description, PO Qty, *UOM, Category, Amount, and Status. The table contains one row: Line 1, Description Dell Computer, PO Qty 1.0000, *UOM EA, Category 20400, Amount 1500.00, and Status Active. At the bottom, there are links for "Expand All", "Collapse All", "View Printable Version", and a "Go to" dropdown menu.

Unit: GSPRS
PO ID: 0000000059
Origin: DRG
Department: 110600000
PO Status: Pend App
Budget Status: Not Chkd
Copy From:
Header
*PO Date: 04/17/2009
Vendor: DELLMARKET-001
*Vendor ID: 742616805
*Buyer: KMILTON
PO Reference:
Header Details
PO Activities
Add ShipTo Comments
PO Defaults
Add Comments
Add Items From
Purchasing Kit
Catalog
Receipt Status: Not Recvd
*Dispatch Method: Print
Amount Summary
Merchandise: 1500.00
Freight/Tax/Misc.: 0.00
Total Amount: 1500.00 USD
Lines
Line Description PO Qty *UOM Category Amount Status
1 Dell Computer 1.0000 EA 20400 1500.00 Active
Expand All Collapse All
View Printable Version
Go to: ... More ...

Click the Budget Check icon  .

The Express PO should have a PO Status of Pending Approval and a Budget Status of Valid.

The screenshot displays the Oracle Express Purchase Order interface. At the top, the Oracle logo is visible. The page title is "Express Purchase Order". Below this, the "Purchase Order" section shows the following details:

- Unit: GSUFS
- PO ID: 0000000059
- Origin: DRG
- Department: 110600000
- PO Status: Pend Appr
- Budget Status: Valid (highlighted with a red box)

Below the header, there are sections for "Copy From", "Header", and "Amount Summary". The "Header" section includes fields for PO Date (04/17/2009), Vendor (DELLMARKET-001), Vendor ID (742616805), and Buyer (KMILTON). The "Amount Summary" section shows Merchandise (1500.00), Freight/Tax/Misc. (0.00), and Total Amount (1500.00 USD). The "Lines" section at the bottom shows a single line item for "Dell Computer" with a quantity of 1.0000 and an amount of 1500.00.

6.1 Budget Checking Errors in the Express PO

Budget Checking will be initiated by the Requester on the Express PO on-line page. This is done by clicking on the Budget Checking icon.

A valid Budget Check will create an encumbrance on the budget ledger.

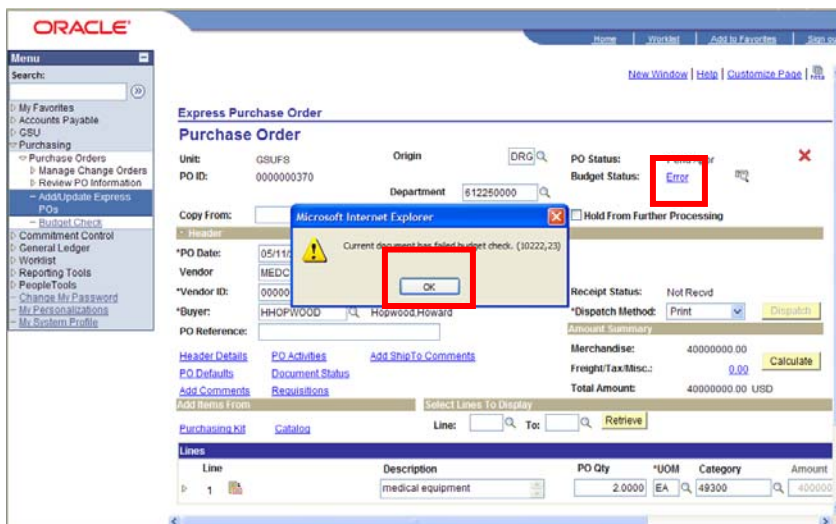
- Budget Check process involves editing the Chartfield data, processing a document tolerance check, and creating an encumbrance for a single Purchase Order.
- After Budget Checking process is run, the system produces a "Valid", "Warning" or "Error" status:
 - o Valid = Transaction passed with no warnings or errors; process updates the control budget

- o Warning = Transaction passed, but with warnings; process updates the control budget
- o Error = Transaction failed; process does not update the control budget

6.2 Budget Check Exceptions

If the Budget Check process results in an error, it must be resolved before the Purchase Order can be processed further.

PO Budget Check exceptions may be reviewed using the PO Budget Status Error hyperlink. Typically, budget exceptions result from the budgets not existing or exceeding the budget tolerance. To view the budget error in detail, click OK , then click on the Budget Status Error link.



You are now viewing the Purchase Order Exception and Line Exceptions page. Budgets with Exceptions shows the budget checking error. In this example, the Exception is “Exceeds Budget Tolerance”, which means the purchase order amount is more than the amount available in the budget. To view more detail about the budget and error, click on “Go To..” link, which is where you view related links.

The screenshot shows the Oracle Purchase Order Exceptions page. The left sidebar contains a menu with options like 'My Favorites', 'Accounts Payable', 'GSU', 'Purchasing', 'Commitment Control', 'Budget Journals', 'Review Budget Activities', 'Review Budget Check Exceptions', 'Purchasing and Cost Management', 'Purchase Order', 'Purchase Order Non-prorated', 'Travel and Expenses', 'Accounts Payable', 'Revenues', 'General Ledger', 'Budget Exceptions', 'General Ledger', 'Worklist', 'Reporting Tools', 'PeopleTools', 'Change My Password', 'My Personalizations', and 'My System Profile'. The main content area is titled 'Purchase Order Exceptions' and 'Line Exceptions'. It displays a table of exceptions. The first exception is 'Exceeds Budget Tolerance' for Business Unit 'GSUFS' and Ledger Group 'APPROP'. The 'Go To...' link is highlighted with a red box.

Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1 GSUFS	APPROP	Exceeds Budget Tolerance	More Detail	☐	Go To...

On this page, choose the Go to Budget Inquiry link.

The screenshot shows the Oracle Go to Budget Inquiry page. The left sidebar contains the same menu as the previous screenshot. The main content area is titled 'Go to Budget Inquiry' and displays a link labeled 'Go to Budget Inquiry' highlighted with a red box. Below the link is a 'Cancel' button.

Now you are on the Commitment Control Budget Details page. This gives an overview of budget. Under Available Budget, you are able to view the balance available in the budget and make necessary adjustments to the Express PO.

ORACLE

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | http

Menu

Search: >>

- My Favorites
- Accounts Payable
- GSU
- Purchasing
- Commitment Control
 - Budget Journals
 - Review Budget Activities
 - Review Budget Check Exceptions
- Purchasing and Cost Management
 - Purchase Order
 - Purchase Order Non-prorated
- Travel and Expenses
- Accounts Payable
- Revenues
- General Ledger
 - Budget Exceptions
- General Ledger
- Worklist
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile

Commitment Control Budget Details

Business Unit	Ledger Group	Account	Fund	Dept	Class	Bud Ref	PC Bus Unit	Project
GSUFS	APPROP	N00000	10000	612A00000	11000	2009		

[Display Chart](#) ⓘ

Ledger Amounts

Budget: 6,513,763.00 USD [Attributes](#) Max Rows:

Expense: 52,393.83 USD [Parent / Children](#)

Encumbrance: 791,106.56 USD [Associated Budgets](#)

Pre-Encumbrance: 0.00 USD

Associate Revenue: 0.00 USD

Available Budget

Without Tolerance:	5,670,262.61 USD	Percent:	(87.05%) Forecasts
With Tolerance:	5,670,262.61 USD	Percent:	(87.05%) Forecasts

Budget Exceptions

Exception Errors: 3 Exception Warnings: 0 [Budget Exceptions](#)

You may resolve the budget checking error in three (3) ways:

Updating the distribution lines on a PO

Adjusting the PO amount

Requesting a budget amendment to transfer funds to the required distribution

The PO will have to be budget checked again. Once the PO has a Budget Check status of "Valid", it can continue through the PO process.

7. Workflow Approval

GSU will use the Chartfield Approval workflow. Workflow routings will be based on the Origin and Department/Project that users select on the document header. The Origin and Department/Project selected on the transaction header will determine the workflow approval routing for the transaction. Users that are approvers will be assigned to an Approval Role (i.e – Approver 1 or Approver 2). In addition, users will be assigned to individual Departments and Project Id's. These assignments will be maintained by the Workflow Administrator.

Security Roles will need to be established for the approvers. GSU should assign unique individuals to each of the workflow approval roles/levels.

The Origin that will have workflow approval enabled are as follows:

DRG – Department Regular

PRJ – Project Regular

GSU will use the following levels of workflow approval for each of the transactions:

Purchase Orders - DRG

Department Approver 1

Department Approver 2

Purchase Orders - PRJ

Project Approver 1

Project Administrator

Project Approver 2

8. PO Maintenance

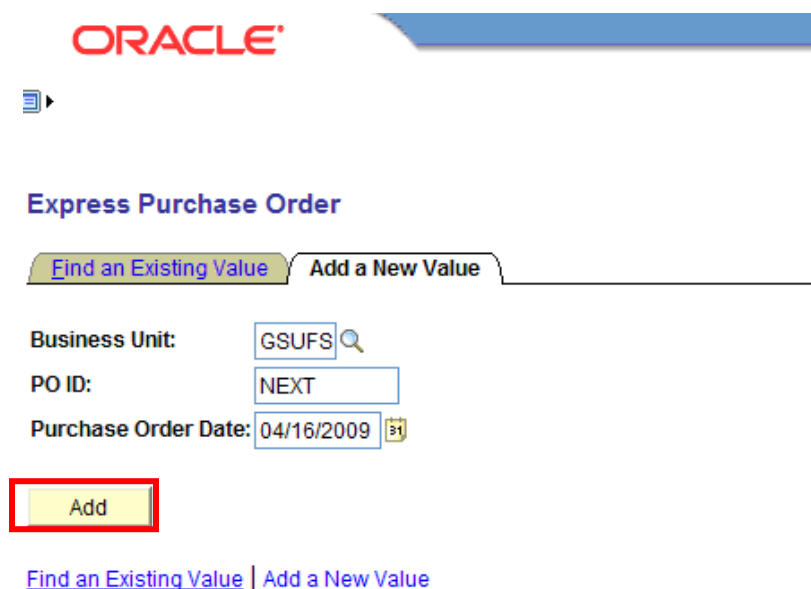
PO maintenance involves correcting your Express PO after budget checking has occurred. Be advised that the Express PO cannot be corrected or canceled by the requestor after it has been through the approval process.

8.1 Copying an Express PO from An Existing Express PO

When creating an Express PO for Travel or an Consulting Contract, there is a Express PO template available for you to copy.

8.1.1 Creating a Travel PO/Consultant PO

Click on the **Add a New Value** tab.



ORACLE

Express Purchase Order

[Find an Existing Value](#) **Add a New Value**

Business Unit: 

PO ID:

Purchase Order Date: 

Add

[Find an Existing Value](#) | [Add a New Value](#)

Click on the drop down arrow next to the **Copy From** field and select **Purchase Order**.

Oracle

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: PO Status: Initial
 PO ID: NEXT Budget Status: Not Chk'd
 Copy From: **Purchase Order** ☐ Hold From Further Processing

Header

*PO Date: [Vendor Search](#)
 Vendor: [Vendor Details](#)
 *Vendor ID:
 *Buyer:
 PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#)
[Add Comments](#)
[Add Items From](#)

Amount Summary

Receipt Status: Not Recvd
 *Dispatch Method: [Dispatch](#)
 Merchandise: 0.00
 Freight/Tax/Misc.: 0.00 [Calculate](#)
 Total Amount: 0.00 USD

[Purchasing Kit](#) [Catalog](#)

Lines

Line	Description	PO Qty	*UOM	Category	Amount
1					

[Expand All](#) [Collapse All](#) [More...](#)

Type in the template name (**ETRAVEL**, **STRAVEL**, or **CONSULTANT**) in the PO ID field, click the magnifying glass, click the blue hyperlink, and click on Search. Then click the check box next to the template name and click **OK**.

Express Purchase Order

Copy Purchase Order from Purchase Order

PO Selection Criteria

PO ID: PO Date:

Vendor: Status:

Vendor ID: Origin:

Buyer: Item ID:

PO Reference: Category:

Select PO [Customize](#) [Find](#) [View All](#) First 1 of 1 Last

[Details](#) [More Details](#)

Select	PO ID	PO Date	PO Status	Vendor ID	Vendor
☐	CONSULTANT	07/01/2010	Dispatched	0000000001	GSUDEFAULT-001

The system will redirect you to the main page. There is now information copied into the Express PO.

ORACLE

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page |

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
 - Commitment Control
 - General Ledger
 - Worklist
 - Reporting Tools
 - PeopleTools

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: PO Status: Pend Appr
 PO ID: NEXT Department: Budget Status: Not Chkd

Copy From: ☐ Hold From Further Processing

Header

*PO Date: [Vendor Search](#)
 Vendor: [Vendor Details](#)
 *Vendor ID: GSU DEFAULT - SELECT NEW VENDOR Receipt Status: Not Recvd
 *Buyer: Blackburn, Trennye *Dispatch Method: [Dispatch](#)

PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)

[PO Defaults](#) [Add Comments](#)

[Add Items From](#)

Amount Summary

Merchandise: 0.01
 Freight/Tax/Misc.: 0.00 [Calculate](#)
 Total Amount: 0.01 USD

[Purchasing Kit](#) [Catalog](#)

Lines

Line	Description	PO Qty	*UOM	Category	Amount
1	Employee Travel	1.0000	EA	96288	

Expand All | Collapse All

Please note that when the template is copied to a new Express PO, the information must be changed to reflect the new information required for your department. Update the Origin by clicking on the magnifying glass. This will determine the workflow routing for approval. If these expenditures are charged to a project, select PRJ for Origin. In this example, select DRG (expenditures will not be charged to a project) from the Search list.

ORACLE

Home Worklist Add to Favorites Sign out

[New Window](#) | [Help](#) |

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
 - Commitment Control
 - General Ledger
 - Worklist
 - Reporting Tools
 - PeopleTools

Look Up Origin

SetID: GSUFS

Origin: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-4 of 4 Last

Origin	Description
DRG	Department Regular Rule
FA	Financial Aid - Stu Ac Ret/Ret
ONL	On Line
PRJ	Project Regular

You will be redirected to the main page. Update the Department ID by clicking the magnifying glass.

ORACLE

Home Worklist Add to Favorites Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
 - Commitment Control
 - General Ledger
 - Worklist
 - Reporting Tools
 - PeopleTools

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: DRG PO Status: Pend Appr
 PO ID: NEXT Department: Budget Status: Not Chk'd

Copy From: Hold From Further Processing

Header

*PO Date: 04/24/2009 Vendor Search
 Vendor: GSUDEFAULT-001 Vendor Details
 *Vendor ID: 0000000001 GSU DEFAULT - SELECT NEW VENDOR Receipt Status: Not Recvd
 *Buyer: TBLACKBURN Blackburn,Trennye *Dispatch Method: Print Dispatch
 PO Reference:

Header Details PO Activities Add Ship To Comments
 PO Defaults Add Comments
 Add Items From

Amount Summary

Merchandise: 0.01
 Freight/Tax/Misc.: 0.00 Calculate
 Total Amount: 0.01 USD

Purchasing Kit Catalog

Lines

Line	Description	PO Qty	*UOM	Category	Amount
1	Employee Travel	1.0000	EA	96288	

Enter the first few digits of your department ID and click the Look Up button. Select your department ID.

ORACLE

Menu
Search:

- Accounts Payable
- GSU
- Purchasing
 - Procurement Contracts
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
- Travel and Expenses
- Accounts Receivable
- BOR Menus
- Commitment Control
- General Ledger
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools

Look Up Department

Department:

[Basic Lookup](#)

Search Results

View All First 1 of 1 Last

Department	Description
110600000	Biology

When you choose the Department ID from the Search list, you will be redirected to the main page. Change the Vendor ID to the name of the traveler in your department or to the name of the consultant or consulting company. Begin by clicking on the magnifying glass next to the Vendor ID field.

ORACLE

Menu
Search:

- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
 - Commitment Control
 - General Ledger
 - Worklist
 - Reporting Tools
 - PeopleTools

Home Worklist Add to Favorites Sign out

[New Window](#) [Help](#) [Customize Page](#)

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: DRG PO Status: Pend Appr
PO ID: NEXT Budget Status: Not Chk'd
Department: 110600000

Copy From: ☐ Hold From Further Processing

Header

*PO Date: 04/24/2009 [Vendor Search](#)

Vendor: [Vendor Search](#)

*Vendor ID: 0000000001 GSU DEFAULT - SELECT NEW VENDOR

*Buyer: TBLACKBURN Blackburn Trenne

PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)

[PO Defaults](#) [Add Comments](#)

[Add Items From](#)

[Purchasing Kit](#) [Catalog](#)

Amount Summary

Receipt Status: Not Recvd
*Dispatch Method: Print

Merchandise: 0.01
Freight/Tax/Misc.: 0.00
Total Amount: 0.01 USD

Lines

Line	Description	PO Qty	*UOM	Category	Amount
1	Employee Travel	1.0000	EA	96288	

In the Short Vendor Name field, enter the traveler's last name, COMMA, first initial or if you are issuing a consultant PO, enter the first few letters of the company name and click the Look Up button. Click your selection from the Search list.

ORACLE

Home Worklist Add to Favorites Sign out

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
 - Commitment Control
 - General Ledger
 - Worklist
 - Reporting Tools
 - PeopleTools

Look Up Vendor ID

SetID: GSUFS

Vendor ID:

Short Vendor Name:

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View all First 1 of 1 Last

Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
001154244	LUALLEN,CA-002	Luallen,Catherine L	(blank)	(blank)	(blank)

The Express Purchase Order Main Page is displayed.

ORACLE

Home Worklist Add to Favorites Sign out

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
 - Commitment Control
 - General Ledger
 - Worklist
 - Reporting Tools
 - PeopleTools

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: DRG PO Status: Pend Appr
 PO ID: NEXT Budget Status: Not Chk'd
 Department: 120010000

Copy From: ☐ Hold From Further Processing

Header

*PO Date: 04/24/2009 [Vendor Search](#)
 Vendor: LUALLEN,CA-002 [Vendor Details](#)
 *Vendor ID: 001154244 Luallen,Catherine L
 *Buyer: TBLACKBURN Blackburn,Trennye
 PO Reference:

[Receipt Status](#) [PO Activities](#) [Add ShipTo Comments](#)

[PO Defaults](#) [Add Comments](#)

Amount Summary

Merchandise: 0.01
 Freight/Tax/Misc.: 0.00 [Calculate](#)
 Total Amount: 0.01 USD

Lines

Line	Description	PO Qty	*UOM	Category	Amount
1	Employee Travel	1.0000	EA	96288	

Click on the PO Defaults link and update the Speedchart information and click the magnifying glass.

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
- Commitment Control
- General Ledger
- Worklist
- Reporting Tools
- PeopleTools

SpeedChart:

Chartfields **Asset Information** **FTT**

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project
1	100.0000	GSUFS		10000	110600000	11100	11000	2009		

OK Cancel Refresh

Select your Speedchart from the Search list.

Menu

Search:

- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
- Commitment Control
- General Ledger
- Worklist
- Reporting Tools
- PeopleTools

[New Window](#) | [Help](#)

Look Up SpeedChart

SetID:

SpeedChart Key:

[Basic Lookup](#)

Search Results

View All First 1-3 of 3 Last

SpeedChart Key	Description
BIOLU	Biology - Dept Research
BIOLI	Biology
BIOLR	Biology

The system returns you to the PO Defaults page and your information will populate the Distribution field. Scroll to the bottom of the page and click OK.

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project	Activity	Budget Date	Location
1	100.0000	GSUFS		10000	110600000	11100	11200	2009				04/16/2009	PO_MAIN

Any changes that you make on the PO Defaults page will cause the “Retrofit field changes” page to appear. Click on the **Select All** link. You must click this Select All link to change the default chartfield values on the template to your speedchart values. Notice when you click on this link, all of the boxes in the ‘Apply’ column will be checked.

Express Purchase Order

Retrofit field changes to "all" existing PO lines/schedules/distributions.....

Unit: GSUFS PO ID: NEXT Vendor: LUAllen,CA-002

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.
Select 'Apply to All Distribs' to apply changes to all distribution lines on the PO.

Apply	Distrib Line	Field Name	Field Value
☒		Ship To	CENTRAL
☒		Ship Via	VENDOR
☒		Freight Terms Code	FOB DEST

☒ Select All ☐ Clear All

OK Cancel Refresh

The system will return you to the main page of the Express PO. To access the template comments for the Travel PO and the Consultant PO, click the Edit Comments link.

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: DRG PO Status: Pend Appr
 PO ID: NEXT Department: 110600000 Budget Status: Not Chk'd

Copy From: ☐ Hold From Further Processing

Header

'PO Date: 04/24/2009 [Vendor Search](#)
 Vendor: LUAllen,CA-001 [Vendor Details](#)
 'Vendor ID: 001154244 Luallen,Catherine L
 'Buyer: TBLACKBURN Blackburn,Trennye
 PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)

[PO Defaults](#)

[Edit Comments](#) [Add Items From](#)

Amount Summary

Receipt Status: Not Recvd
 'Dispatch Method: Print [Dispatch](#)
 Merchandise: 0.02
 Freight/Tax/Misc.: 0.00 [Calculate](#)
 Total Amount: 0.02 USD

[Purchasing Kit](#) [Catalog](#)

Lines

Line	Description	PO Qty	'UOM	Category	Amount	Status
1	Employee Travel Expenses	1.0000	EA	96288	0.01	Active
2	Employee Travel - Mileage	1.0000	EA	96298	0.01	Active

[Expand All](#) [Collapse All](#)
[View Printable Version](#)

Go to:

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

For the **Travel Template** enter the Traveler's Name, Travel To information, Dates, Purpose of Travel, and who will handle Classes/Duties in the traveler's absence. On the **Consultant Template**, you will enter the SS# or FEI #, the address, and attach a copy of the Statement of Work or Payment Schedule. For each template, always check the **Shown at Voucher** box so the comments in this section are available for Disbursements to view. Click **OK**.

Menu

Search:

- My Favorites
- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
- Commitment Control
- General Ledger
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations
- My System Profile

[New Window](#) | [Help](#) | [Customize Page](#) |

PO Header Comments

Unit: GSUFS PO ID: NEXT Vendor: LUAllen,CA-002

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments Find | View All First 1 of 1 Last

[Copy Standard Comments](#)

Comment Status: Active Inactivate +

Traveler's Name: CATHERINE LUAllen
 Travel To: LAS VEGAS, NEVADA
 Dates: 6/1/2009 - 6/7/2009
 Purposes: PROCUREMENT MANAGEMENT TRAINING
 Classes/Duties in my absence will be handled by: LARRY MCCALOP

☐ Send to Vendor ☐ Shown at Receipt ☒ Shown at Voucher

Associated Document

Attachment Attach View Delete Email

OK Cancel Refresh

You will be redirected to the main page. Click the Expand All link. Under Line #1, on the Schedules line, go to the Price box and enter the amount you wish to encumber for the trip. If there is mileage involved with this trip, enter the estimated mileage amount in the Price box under Line #2 on the Schedules line.

The screenshot displays the Oracle PO Line interface. At the top, the Oracle logo is visible. The interface is divided into two main sections for Line 1 and Line 2.

Line 1:

- Description:** Employee Travel
- PO Qty:** 1.0000
- *UOM:** EA
- Category:** 96288
- Amount:** 5500.00
- Status:** Active

Schedules:

Sched	*Due Date	*Ship To	*PO Qty	Price	Amount	Status	*Distribute by
1	06/03/2009	CENTRAL	1.0000	5500.00000	5500.00	Active	Amount

Distributions:

Dist	Status	Percent	Amount	Curr	*GL Unit	*Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project
1	Open	100.000	5500.00	USD	GSUFS	640100	10000	110600000	11100	11000	2009		

Line 2:

- Description:** Employee Travel - Mileage
- PO Qty:** 1.0000
- *UOM:** EA
- Category:** 96288
- Amount:** 100.00
- Status:** Active

Schedules:

Sched	*Due Date	*Ship To	*PO Qty	Price	Amount	Status	*Distribute by
1	05/11/2009	CENTRAL	1.0000	100.00000	100.00	Active	Amount

Distributions:

Dist	Status	Percent	Amount	Curr	*GL Unit	*Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project
1	Open	100.000	100.00	USD	GSUFS	640500	10000	110600000	11100	11000	2009		

At the bottom left, there are two links: [Expand All](#) and [Collapse All](#). The [Expand All](#) link is highlighted with a red box.

If the information on the Distributions line is correct, click the **Save** button. Click the **Budget Checking** icon.

Note that you now have a PO ID assigned to your PO. The PO Status is **Pending Approval** and the Budget Status is **Valid**. You have successfully copied an Express PO from the Travel or Consultant PO template.

ORACLE

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

Express Purchase Order

Purchase Order

Unit: GSUFS Origin: DRG PO Status: Pend Appr Budget Status: Valid

PO ID: 0000000369 Department: 110600000

Copy From: [Dropdown] ☐ Hold From Further Processing

Header

*PO Date: 05/11/2009 Vendor Search
 Vendor: LUALLN,CA-002 Vendor Details
 *Vendor ID: 001154244 Luallen,Catherine L
 *Buyer: TBLACKBURN Blackburn,Trennye
 PO Reference: [Text Box]

Receipt Status: Not Recvd
 *Dispatch Method: Print Dispatch

Amount Summary

Merchandise: 5600.00
 Freight/Tax/Misc.: 0.00 Calculate
 Total Amount: 5600.00 USD

Header Details PO Activities Add ShipTo Comments
 PO Defaults Document Status
 Edit Comments Requisitions

Add Items From Select Lines To Display

Purchasing Kit Catalog Line: [Text Box] To: [Text Box] Retrieve

Line	Description	PO Qty	*UOM	Category	Amount	Status
1	Employee Travel	1.0000	EA	96288	5500.00	Active
	Employee Travel - Mileage	1.0000	EA	06298	100.00	Active

Your Travel or Consultant PO is ready to be processed. Please follow the appropriate guidelines for Travel and Consultant Services as described by the Office of Disbursements.

The training manual and policies for consultant services and travel can be found on the following websites:

http://www2.gsu.edu/~wwwfas/FinancialOperation/consultingcontract_new.html

<http://www2.gsu.edu/~wwwfas/FinancialOperation/TravelServices.pdf>

APPENDIX A

Dollar Value Grid (Effective 7/1/2009)

Choose Order Cost by column to right and Purchase Type by row below. Intersecting Square indicates Method(s) of Purchase.	\$0.00 to \$2,999.99	\$3,000.00 to \$4,999.99	\$5,000.00 or greater
Supplies (which include non-inventoried equipment with a cost of less than \$3,000.00) not otherwise classified below.	P-Card Voucher	P-Card Voucher	Express PO
Equipment (which will be placed into inventory, i.e. which has a cost of \$3,000.00 or more and useful life of 3 years or more) not otherwise classified below	N/A	Express PO	Express PO
Business Cards and Stationery NOTE: Artwork must be approved by University Relations before being sent to University Printing	University Printing	University Printing	University Printing
Classified Ad(s) NOTE: Non-faculty recruitment ads require HR approval prior to being placed.	P-Card Voucher	P-Card Voucher	Express PO
Computer Hardware, Software and Peripherals and other technology purchases NOTE: Certain purchases may require additional approvals and review before purchase. See IT Procurement Review Procedure for details.	P-Card Voucher Express PO	P-Card (non-equipment only) Voucher (non-equipment only) Express PO	Express PO
Construction NOTE: All construction requires DCS approval prior to the beginning of work. This includes any equipment installation that involves changes or attachment to building structures.	DCS	DCS	DCS
Filing Cabinets / Furniture	Contact Buyer before purchase	Contact Buyer before purchase	Express PO
HazMat Waste Removal	Safety	Safety	Safety
Maintenance Contract(s)	Express PO	Express PO	Express PO

Office Supplies - General	P-Card Voucher	P-Card Voucher	Express PO
Printing	University Printing P-Card Voucher	University Printing P-Card Voucher	Express PO
Renovations NOTE: All renovations require DCS approval prior to the beginning of work. This includes any equipment installation that involves changes or attachment to building structures.	DCS	DCS	DCS

APPENDIX B - Commodity Listing by Buyer

Commodity	Buyer
Audio/Visual Equipment and Supplies	Attlee Billings
Building Maintenance	Rodney Holden
Building Supplies	Rodney Holden
Bus Charters	Attlee Billings
Computer Equipment	Logan Allen
Computer Peripherals	Logan Allen
Computer Software	Logan Allen
Consultant	Larry McCalop
Construction	Rodney Holden
Copiers	Sharee Willoughby
Elevator Maintenance	Rodney Holden
Fax Machines	Sharee Willoughby
Furniture	Sharee Willoughby
Gas Cards	Harrice Moore
Grounds Maintenance Contracts	Attlee Billings
HVAC	Rodney Holden
Industrial Supplies	Rodney Holden
Janitorial Equipment and Supplies	Rodney Holden
Laboratory Equipment and Supplies	Logan Allen
Maintenance Contracts (equipment and hardware)	Sharee Willoughby
Maintenance Contracts (software licenses)	Logan Allen
Medical Equipment and Supplies	Logan Allen
Miscellaneous Supplies	Attlee Billings
Police Equipment and Supplies	Attlee Billings
Printers	Logan Allen
Printing	Attlee Billings
Projectors	Logan Allen
Public Works Projects	Rodney Holden
Office Furniture	Sharee Willoughby
Renovation Materials	Rodney Holden
Research Equipment and Supplies	Logan Allen
Scientific Equipment and Supplies	Logan Allen
Travel	Trennye Blackburn
Uniforms	Attlee Billings
Vehicle Maintenance	Harrice Moore
Vehicle Purchase	Attlee Billings

